



**The University of the State of New York – Regents Research Fund (USNY-RRF)**

**ANNOUNCEMENT OF FUNDING OPPORTUNITY**

**REQUEST FOR BID (RFB): Performance-Based Learning and Assessment Networks (PLAN) Mentor Schools**

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## **Eligibility**

To be eligible to serve as a Mentor School in the PLAN Pilot, an entity must be a public or non-public New York State educational institution that is a middle school; high school; Board of Cooperative Educational Services (BOCES); or approved private special education program or Special Act, State-operated, or State-supported school with a middle- and/or high-school component.

The “eligible bidder” is the entity with legal authority to contract on behalf of the Mentor School.

The New York State Education Department (NYSED), through USNY-RRF, seeks to engage exemplary Mentor Schools that are systematically implementing an evidence-based approach or model of performance-based learning and assessment (PBLA) that is available to all students enrolled in the school (or, in the case of a BOCES, all students enrolled in the program). The PLAN Mentor School opportunity is appropriate for schools and BOCES programs interested in supporting PLAN Pilot Schools in making the transition to implementing a system of PBLA at the middle school and/or high school level.

## **Project Description and Scope of Services to be Performed**

Mentor Schools will fulfill a key role in supporting PLAN Pilot Schools to implement PBLA. As a group and individually, the Mentor Schools will work in partnership with NYSED staff and PLAN Professional Learning Providers / Technical Assistance Centers (PLAN TACs) to serve as models for replication and adaptation, help to transfer knowledge, and provide on-the-ground support to PLAN Pilot Schools and Networks, to support their transition to implementing PBLA approaches. NYSED’s vision is that teachers and leaders from Pilot Schools will be able to engage in professional learning experiences with Mentor Schools and see first-hand the instructional shifts that they will need to make in their own schools and classrooms.

Each Mentor School will specialize in one of three Focus Areas that correspond to the three types of promising PBLA approaches operating in New York State (see Focus Areas accordion, below). Each Mentor School will be expected to participate in and provide services to one Pilot Network with approximately three Pilot Schools, based on a process of matching schools that PLAN project staff will manage after contracts are awarded. Mentor Schools must commit to supporting all PLAN Pilot Schools in their Pilot Network through the full implementation process, including providing ongoing mentoring and coaching supports, engaging in Communities of Practice (CoPs) at the Pilot Network level, helping to transfer knowledge, and providing on-the-ground support to the extent possible.

In addition to participating in and providing services to their assigned Pilot Network, each Mentor School will be encouraged to engage in Focus-Area-wide and Pilot-wide collaboration—including but not limited to participating in CoPs and hosting school intervisitations—in furtherance of the PLAN project’s goals and objectives. This entails building a collaborative relationship with the PLAN TACs, other Mentor Schools and Pilot Schools across Pilot Networks and Focus Areas, and, as appropriate, with New York’s existing school capacity-building networks and organizations.

Importantly, the contracted PLAN TACs have primary responsibility for providing professional learning and technical assistance to PLAN Pilot Schools and Networks. These PLAN TACs are further charged with collaborating with Mentor Schools to coordinate and facilitate the provision of learning opportunities to educators in their Pilot Network, such as school intervisitations, modeling PBLA practices, peer coaching and mentoring, and collaboratively addressing problems of practice (see p. 16 of [RFP #23-018](#)).

Finally, to advance the PLAN Pilot’s goals, objectives, and outcomes—which include conducting a rigorous evaluation to identify key professional learning supports, technical assistance, and other conditions needed

for schools to implement PBLA—each Mentor School must cooperate with USNY-RRF and NYSED and their research and evaluation partners in the collection and reporting of qualitative and quantitative data regarding the PBLA implementation and the associated professional learning, technical assistance, and other supports utilized by Pilot Schools and Pilot Networks in making the transition.

### Deliverables

Within their PLAN Pilot Network, Mentor Schools will be responsible for the following deliverables, all of which should be fully addressed in the bid narrative and budget:

1. Provide a **PBLA Support Leader** throughout the contract term who will serve as a point of contact and coordination with their network’s Pilot Schools and PLAN TAC, as well as with USNY-RRF and NYSED and their research and evaluation partners;
2. Invite teachers and leaders from PLAN Pilot Schools to engage in the Mentor School’s established **professional learning experiences** alongside their teachers and leaders, including, to the maximum amount possible, creating and providing new professional learning activities that support both Mentor School and Pilot School teachers and school leaders;
3. Provide **opportunities for PLAN Pilot School staff to visit** and, if/when feasible, provide Pilot School staff with short-term opportunities to experience and participate in the life and work of the Mentor School, beyond just visiting and observing;
4. Provide **instructional coaching** for PLAN Pilot School educators; and
5. Provide **mentoring** to PLAN Pilot School educators and engage in **PLAN Pilot Communities of Practice** (CoPs).

### Focus Areas

NYSED’s vision is that each PLAN Pilot Network will include a Mentor School proficient in implementing PBLA in accordance with key features of a particular Focus Area. The three Focus Areas are differentiated by the following key features:

#### Focus A: Career and Technical Education and Work-Based Learning

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Grade Level: High School
Instructional Model: Structured learning experiences for students that are explicitly connected to classroom-based learning;  Features coaching/mentoring and hands-on experiences in authentic settings, including work-based learning, internships, and other real-world opportunities;  Focused on exploring postsecondary career pathways and technical training to provide students with opportunities to apply their knowledge gained from classroom instruction to real-world situations.
Assessment: Incorporates performance measures on student application of knowledge and skills to the workplace and other settings, including

knowledge of career pathways and exhibition of technical skills, such as those assessed for CDOS Option 1 or CTE 4+1 pathways;

Includes a portfolio of student work;

Culminates in a credential that communicates evidence about each student's learning, achievement, and competencies.

## **Focus B: Inquiry-Based Approach with Learner Profile**

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Grade Level: Middle School and High School

**Instructional Model:** Inquiry-based pedagogical approach designed around a “learner profile” that aims to help students develop a set of attributes through their educational experience;

Focused on understanding individual strengths and weaknesses, to support learning and personal development;

Promotes conceptual learning;

Develops skills for inquiry, research, and responsible action;

Offers interdisciplinary learning and opportunities for students to connect that learning to their community and global contexts.

**Assessment:** Uses a combination of school-based and externally evaluated assessment strategies to measure students' individual performance on specified objectives;

Includes personal and community projects.

## **Focus C: Project-Based Learning and Performance-Based Assessment Tasks**

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Grade Level: High School

**Instructional Model:** Project-based learning approach that organizes learning around student design of complex tasks and presentation of an original product, following a self-directed, long-term investigation;

Features inquiry- and literacy-based curriculum across content areas, designed to build toward student completion of performance-based assessment tasks;

Supports the development of strong language skills by purposefully including interdisciplinary and experiential learning opportunities and collaborative structures that build on the strengths of each member of the school community, motivate students, and enhance their capacity to successfully participate in modern society.

Assessment: Uses practitioner-developed, externally evaluated performance-based assessment tasks that comprise both oral and written components to assess graduation-level work in core subject areas.

## Grant Awards

USNY-RRF will run three (3) competitions within this application, one for each of the Focus Areas, and make up to eight (8) awards. Eligible bidders must submit separate applications if they are bidding for more than one school and/or more than one Focus Area. Awards will be based on the results of the PLAN Pilot School selection process and will be made based on considerations of both the Focus Area ***and*** the regions the applicant is willing to support:

1. **Focus Area:** The awards made through this competition will consist of a combination of Mentor Schools across the three (3) Focus Areas. Based on the number of Pilot Schools selected in each Focus Area, the number of Mentor Schools needed in each Focus Area is anticipated to be at least two (2) and no more than (4).
2. **Region:** Mentor School selection will also depend in part on the regions in which PLAN Pilot Schools are located for each Focus Area. Awards will be made to support PLAN Pilot Networks that will span New York State’s economic development regions (i.e., Capital Region, Central NY, Finger Lakes, Long Island, Mid-Hudson, Mohawk Valley, New York City, North Country, Southern Tier, and Western NY). The regions covered by each PLAN Pilot Network will be based on the results of the PLAN Pilot School selection process.

The Pilot Schools in a single Pilot Network will not all be located in the same economic development region; rather, each PLAN Pilot Network will likely consist of PLAN Pilot Schools from economic development regions that are adjacent to one another. For example, a PLAN Pilot Network formed for Focus Area A may consist of one PLAN Pilot School located in the Mid-Hudson, one located in New York City, and one located on Long Island. Upstate, schools may be even further spread out. For example, a PLAN Pilot Network formed for a particular Focus Area may consist of one PLAN Pilot School located in the North Country, one from Central New York, and one from the Southern Tier.

The project team anticipates that a Mentor School is likely to be in a different region than one or all of the Pilot Schools in its Pilot Network. Bidders are asked to indicate their willingness to support *each* of the state’s economic development regions and encouraged to consider applying to support a PLAN Pilot Network in regions beyond just the one in which they are located—with the understanding that their inability/unwillingness to support certain regions may be the reason they are not selected.

Awards will be made as follows: Each bid will receive a score for the narrative and a score for the cost proposal, and those scores will be totaled (see “Bid Requirements” below). Applicants applying for the same Focus Area will be ranked according to their total scores. The contracts issued pursuant to this RFB will be awarded to bidders in each Focus Area whose total score is the highest among all the proposals rated, provided that if the set of highest-scoring bidders would not support all regions necessary for the Pilot Schools and Pilot Networks in that Focus Area, USNY-RRF will proceed to the next-ranked bidder. The analysis will be repeated until the combination of Mentor Schools that covers all needed regions at the highest minimum level of quality (as indicated by the total score of the lowest-ranked Mentor School

selected) is achieved. In the event of a tie in the total score within the same Focus Area, the bidder who scored highest for “Program Plan and Organizational Capacity” will be ranked higher. (See the [Applying to Become a PLAN Mentor School webpage](#) for an explanation of the narrative scoring categories.)

## **Term of Contract \*\*\*UPDATED JUNE 06, 2024\*\*\***

USNY-RRF will award up to eight (8) contracts pursuant to this bid. The contract resulting from this RFB will be for a term beginning on or about **September 3, 2024** and ending June 30, 2027.

## **Payments**

The award is \$37,500 per Mentor School. Upon the awarding of the grant, each contractor will receive 50% of the funds up front. It is anticipated that the remaining 50% of the funds will be paid in Spring 2025, contingent on satisfactory performance up to that point.

USNY-RRF and NYSED continue to seek additional funding sources to support the PLAN program, including the needs of Mentor Schools. If such funding becomes available, USNY-RRF would not be able to expand the *scope* of the contracts awarded pursuant to this bid or pay for costs not included in the original budget. Such funds *could only* be provided to the Mentor Schools to supplant matching funds and cost-share for allowable costs that are included in the Cost Proposals submitted pursuant to this bid. Accordingly, bidders are encouraged to include in their Cost Proposal the value of any match, cost-share, and in-kind resources they propose to use to carry out their obligations under this contract—whether provided by the school, the district/board, or other partners.

## **Allowable Costs**

Bidders may use funds awarded pursuant to this bid for the following:

- Compensation for the PBLA Support Leader;
- Stipends for educators within the Mentor School to provide learning opportunities and technical assistance to Pilot School educators, such as school intervisitations, modeling PBLA practices, peer coaching and mentoring, co-creating PBLA tools and resources, and collaboratively addressing problems of practice;
- Substitute teacher coverage, to enable Mentor School educators to participate in professional learning that falls during the school day;
- Travel expenses to carry out the essential work of the project;
- Supplies, materials, and printing directly related to the project;
- Subcontracting costs for direct services necessary to fulfill project goals (limited to 30% of the total budget);
- Costs associated with conducting training or conferences directly related to the project, including such expenses as meeting rooms, supplies and materials for the event, and light beverages and snacks for breaks.

**RFB Timeline \*\*\*UPDATED AUGUST 06, 2024\*\*\***

WEEK OF MAY 06, 2024	→	Request for Bids (RFB) Released
COB THURSDAY, MAY 23RD	→	Questions Deadline
WEEK OF JUNE 3, 2024	→	Q&A Posted
MIDNIGHT, FRIDAY, JUNE 28TH	→	RFB Deadline
JULY 2024	→	Mentor Schools Selected
UPDATED 08/06/24 FRIDAY, AUGUST 30TH	→	Extended Bid Deadline for Focus Area A*
SEPTEMBER 2024	→	Contract Start Date

**Bid Requirements and Forms**

**Technical Proposal.** The technical proposal will be scored on a 90-point scale. The following forms are required for the technical proposal:

- [PLAN Mentor School Technical Proposal Form \(Microsoft Form\)](#)
  - For reference, see a PDF of the full technical proposal form [here](#).
- [District/Board Commitment Form](#) (Not scored.)
- [School/Program Commitment Form](#) (Not scored.)

**Cost Proposal.** The cost proposal will be scored on a 10-point scale. Cost proposals will be evaluated based on reasonableness of expenses to be covered with awarded funds (5 points) and thoroughness in costing out all services to be provided (5 points). The cost proposal template in Excel is posted [here](#). For each deliverable, the template includes space to provide:

- A brief narrative description;
- The amount to covered with awarded funds; and
- The amount to be covered with match/cost-share/in-kind contributions from the school, district/board, and/or other partners.

**Questions & Answers**

Questions related to this RFB should be submitted to [PLAN.Pilot@nysed.gov](mailto:PLAN.Pilot@nysed.gov) by close of business (COB) Thursday, May 23, 2024, and include “RFB PLAN Pilot” in the subject line. Questions will not be answered directly. To ensure all potential bidders have access to the same information, a summary of Questions & Answers will be posted below by Thursday, June 6, 2024. Project staff will not be assisting bidders in completing the technical or cost proposal or collecting the necessary information for submission.

**Designated Contacts:**

Program Matters - Nicole Lennon, [PLAN.Pilot@nysed.gov](mailto:PLAN.Pilot@nysed.gov)

Fiscal Matters - Ed Lenart, [PLAN.Pilot@nysed.gov](mailto:PLAN.Pilot@nysed.gov)

## **Bid Submission Process and Deadline \*\*\*UPDATED AUGUST 06, 2024\*\*\***

Bidders must complete all required fields in the technical proposal form and submit the final bid no later than **midnight, Friday, June 28, 2024**. The remaining materials should be submitted in PDF format by email to [PLAN.Pilot@nysed.gov](mailto:PLAN.Pilot@nysed.gov), labeled with the proposed Mentor School's name and the name of the document. USNY-RRF will not be providing feedback on proposals or allowing bidders to revise and resubmit.

### **UPDATED 08/06/24**

The PLAN Mentor School Request for Bids (RFB) application period has been extended for eligible applicants to submit bids for Focus Area A: Career & Technical Education and Work-Based Learning. This Focus Area received fewer than 3 bids by the original deadline. Bids will be accepted for this Focus Area until August 30th.

All bids are due by midnight August 30, 2024.

Bidders from the re-opened Focus Area that already submitted an application do not need to re-submit their materials.

For other Focus Area a sufficient number of applications were received by the original June 28, 2024, deadline and are undergoing reviews. New or revised bids from Focus Areas B and C will not be considered.